# WISP SERVICE TRANSACTIONS

The Service Transactions section of ClientPoint gives you the ability to identify client needs, provide services, or make referrals to agencies that can provide services needed. Service Transactions also creates a record of the services provided to the client. Service Transactions are vital to providing a complete and accurate picture of clients needs and the services provided to them. These service transactions can help you identify trends, service gaps in your community, counts of needs, and more.

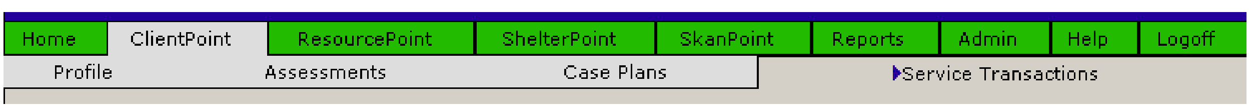
☑ **A SERVICE TRANSACTION IS REQUIRED FOR EVERY CLIENT SERVED WITH THE FOLLOWING FUNDING SOURCES → ESG THP HPP**

You are limited to the following services for tracking 2006-2007 ESG, THP and HPP funds. If you wish to track other services that are not funded by ESG, THP or HPP you may use other services from the AIRS Taxonomy list.

| Description | AIRS Service Code | Description | AIRS Service Code |
|---|---|---|---|
| Transitional Shelter | BH-180.950 | Emergency Shelter | BH-180 |
| Work Clothing | BM-650.150-95 | Medical Expense Assistance | BR-500 |
| Utility Assistance | BR-900 | Mediation | FP-070.500 |
| Transportation Expense Assistance | BR-850 | Meals | BD-500 |
| Substance Abuse Services | LX | Life Skills Education | PH-620.460 |
| Representative Payee Services | DD-500.700 | Legal Services | FT |
| Rental Deposit Assistance | BR-300.725 | Job Training | ND-200.350 |
| Rent Payment Assistance | BR-300.700 | Housing Counseling | BH-370 |
| Outreach Programs | TJ-650.630 | Household Goods | BM-300 |
| Moving Expense Assistance | BR-550 | Foreclosure Assistance | DD-500.180-20 |
| Motel Vouchers | BH-180.850-53 | Education | H |
| Mortgage Payment Assistance | BR-300.500 | Economic Self Sufficiency Programs | PH-236.200 |
| Mental Health Care and Counseling | R | Case/Care Management | PH-100 |
| Child Care | PH-160.150 | Automobile Repairs | BM-700.050 |

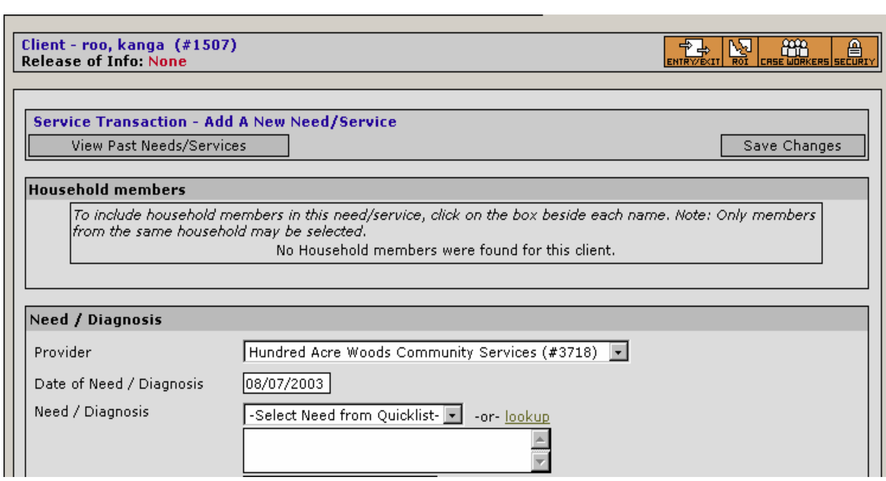
## *First Step:* Identifying a Need for a Service or a Referral

1. Click on the Service Transactions gray tab from the ClientPoint profile screen.




2. When you enter the Service Transaction section, WISP automatically brings you to the Add a New Need/Service screen.

3. If this need/service should be associated with other household members, click on the checkbox next to each household name.



- **Enter the following information for the need.**

1. **Provider** If you are not entering data in the program from which the service is being provided, then use the provider pull down menu to select the appropriate program. Make sure the service is identified with the appropriate program.

2. **Date of Need Diagnosis** This date should be the date that the client or household received or began receiving the service.

3. **Type of Need/Diagnosis** Select from the quick list by clicking on the down arrow to show the list to choose the appropriate need.

| *The code available for indicating a need in WISP is the AIRS Taxonomy of Human Services* |
|---|

4. (OPTIONAL) If Need is Financial, enter amount.

5. **Fill out -. *Overall Need Status* and *Overall Outcome*.**

   If providing a **SERVICE:**

| | | |
|---|---|---|
| Overall Need Status | -Select- | **CLOSED** |
| Overall Outcome | -Select- | **FULLY MET** |

   If making a **REFERRAL:**

| | | |
|---|---|---|
| Overall Need Status | -Select- | **IDENTIFIED** |
| Overall Outcome | -Select- | |

6. Click "Save Changes."

## *Second Step:* Entering Services Provided *(MANDATORY)*

- Scroll down to *Services Provided for Need Identified* and click on "Add Service."

| Services Provided for Need Identified | | | | Add Service |
|---|---|---|---|---|
| **Provider** | **Start Date** | **End Date** | **Provider-specific Service** | **Referred By** |
| No Services found for this need. | | | | |

- In the popup service window, ensure that check marks are placed next to each household member who received this service.

- Enter the following information for services provided.

| **Service Provided Data (Tanya Iverson)** | |
|---|---|
| Provider | ServicePoint Sample Agency (#4038) |
| Service | -Select Need from Quicklist- -or- lookup<br>Motel Vouchers<br>BH-180.850-53 |
| Service Start Date | 06/06/2006 02 : 52 PM |
| Service End Date | |
| Provider-specific Service | -Select- |
| Cost Of Service 1 | |
| Source 1 | -Select- |
| Cost Of Service 2 | |
| Source 2 | -Select- |
| Service Notes | |

1. **Provider** Again, If you are not entering data in the program from which the service is being provided, then use the provider pull down menu to select the appropriate program. Make sure the service is identified with the appropriate program.

2. **Service Start Date** is the date the service started

3. **Service End Date** is the date the service ended and for most of the service items like vouchers or meals will be only hours or a day after the Service Start Date.

4. Provider-specific Service – N/A

5. Cost of Service – N/A

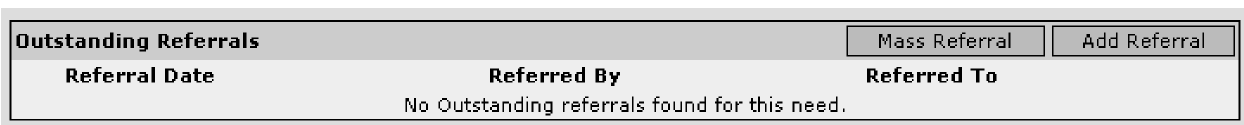
6. **Source 1** – is the main source or two sources of funding for the service provided. It is a mandatory field when recording any service done with dollars from the State.

☑ **POSSIBLE FUNDING SOURCES FOR THE PICKLIST ARE AS FOLLOWS: ESG 2007, HPP 2007, THP 2007, EFSP, AND SHP 2007.**

- Click Save & Exit.

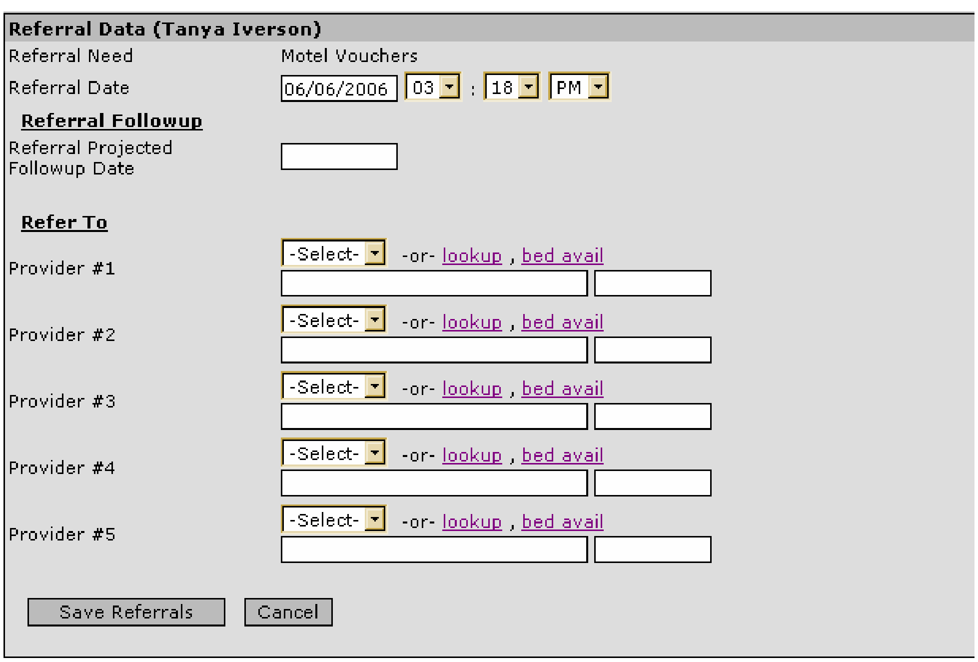
## *Second Step:* <u>Enter Referrals/Make a Referral</u> *(OPTIONAL)*

If your agency is unable to meet the needs of a client, you can refer the client to another agency that might be able to help. To enter a referral into WISP, follow the steps below.




- In "Outstanding Referrals" click on **Add Referral**.

- In the popup referral window, place a checkbox next to each household member who you are also referring.



- For referrals, enter the following information.

    1. Referral Date is the date you made the referral.
    2. Provider (Select the provider from the dropdown list.)
    3. You may refer the client to up to five different providers for one need

- Click on Save Referrals when finished

# Special Considerations or Options

## View or Edit Past Needs/Services

By default, ClientPoint automatically enters Add mode when you click on Service Transactions. If you wish to view past needs or services, click the button *View Past Needs/Services*.

This will give you a list of all past transactions. To view or edit any of them, click on the Edit Icon (pencil) next to the transaction in which you are interested.

## Recording a Service Transaction for Transitional Living

A service transaction should be created when you fill out the entry exit.  The service item should have a start date equivalent to the entry date in the Entry/Exit.  The service item should have an end date equivalent to the exit assessment in the Entry/Exit.

## Recording a Service Transaction for Motel Vouchers

A service transaction should be created for a Hotel/ Motel Vouchers.  The service item should have a start date equivalent to the first night the individual or household began staying in a motel/ hotel and the end date should be the last night the individual or household stayed in the hotel motel.

- 01/01/2006 (start date) – 01/09/2006 (end date)